



INDUSTRY CAPABILITY REPORT



SRI LANKAN FISHERIES SECTOR

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1. INTRODUCTION

Sri Lanka has a well-established fishery industry. There are around 14 deep sea fishing harbors in Sri Lanka. The total fish production in 2016 was 530,920 metric tons and out of this 17,593 metric tons were exported. There are around 18 fishery harbours operated in Sri Lanka.

All high sea boats now adhere with the legal and international standards such as active VMS units on all 1,600 high seas registered Sri Lankan fishing vessels, international call sign, proper gear markings, legal fishing gears, logbooks & other requirements mentioned in the high sea operation regulations.

The main product categories are Tuna, Sward tail, Marlin, prawns, crabs, lobsters, beech de mer and other species.

There are 34 EU certified fish processing plants in Sri Lanka.

2. TYPES OF PLAYERS

The majority of exporters are operating in large scale by networking with cooperative societies and also through backward integration in collecting fish through their own boats and infrastructure.

3. KEY PRODUCTS AND VARIETIES

HS No.	Definition	Main Products
0303	Fish frozen	Tuna, Sword fish, Marlin
030613 030623	Crustaceans	Fresh, chilled and frozen prawns
0302	Fish, fresh, chilled	Tuna, Sword fish, Marlin
0307	Fisheries products	Beche-de-mer, Cuttle Fish, Mollucscs
030614 030624	Crustaceans	Fresh, live, chilled and frozen crabs
030612 030621	Crustaceans	Fresh, live chilled and frozen lobsters
0305	Preserved fish	Maldive fish, sprats, shark fins, fish maws

4. SEASONAL VARIATION

Round the year availability.

5. SPECIALTIES ASSOCIATED WITH PRODUCTS

Sri Lankan Tuna, shrimps and crabs have quality of unique taste and the texture

6. NUMBER OF EXPORTERS

There are more than 75 medium and large scale companies engaged in exporting sea foods but only 32 companies have EU Approved processing plants.

7. KEY PLAYERS

Name exporting company	products
Tabrobane Seafood pvt Ltd	Crabs, Frozen Fish, Prawns,
Global Seafood Pvt Ltd	Frozen Fish, Fish Fresh or
Jay Sea Food Processing Pvt Ltd	Frozen Fish, Fish Fresh or
Island Seafood Exports Pvt Ltd	Frozen Fish, Prawns, Crabs
Tropic Fishery Pvt Ltd	Frozen Fish, Fish Fresh or
Name & address of the exporting company	Products

8. NUMBER OF PEOPLE EMPLOYED IN THE SECTOR

There is close to 2.4 Million direct and indirect employments being generated in this sector. The key stakeholders are fisherman, breeders, processors, logistics, cold chain, packing and other service suppliers.

9. GOVERNMENT POLICY AND SUPPORT AVAILABLE IN THE SECTOR

Sri Lanka established a new Vessel Monitoring System (VMS) to monitor the deep sea fishing fleet, as it was a mandatory requirement for removal of the EU fish ban.

This new technology is a requirement for the sustainable management of the island's fisheries industry and the implementation of the global concept of the Vessel Monitoring System (VMS) which has become mandatory.

Now Sri Lanka is in the process of implementing fishery improvement project (FIP) for Sri Lankan longline tuna and billfish (LT&B) and Blue Swimming Crabs which will help to promote Sri Lanka seafood as sustainable sourced seafood.

10. R&D AND PRODUCT DEVELOPMENT FACILITIES AVAILABLE

There are some organizations dedicated for the development of Fisheries industry in Sri Lanka as follows.

National Aquatic Resources Research and Development Agency (NARA) for research and Development

National Aquaculture Development Authority (NAQDA) for development and management of all freshwater aquatic resources in the country. It also promotes development of aquaculture and sea farming.

Ceylon Fisheries Cooperation (maintenance of cold storage facilities and production and sale of fishery by-products)

Ceylon Fisheries Harbors' cooperation (and maintain fisheries infrastructure facilities such as proper landing facilities through construction, maintenance and management of harbors and anchorages.

Dept of Fisheries (Management, regulation, conservation and development of fisheries and aquatic resources

Cey-Nor Foundation Limited- Building, manufacturing and selling of fishing crafts, engines, & gear and the operation of workshops for repairing of fishing crafts

11. INFRASTRUCTURE AVAILABLE FOR THE SECTOR

There are 26 600 fishing boats in the sector including:

15 022 small traditional craft (48 percent motorized) used in the lagoons and coastal areas;

8 334 fibreglass speedboats with kerosene outboard motors (18-24 ft and 25-40hp motors);

1 550 (21-24 ft) day boats; and

1 700 larger multi-day boats (32-52 ft), some of which venture as far afield

In addition to

Availability of 32 numbers EU approved processing plants

Cold chain facilities

Well equipped harbor facilities

Well developed roads and highways to transport fish from harbor to processing plants and then to the air port (shorter supply chain) within a short period

Used of e business facilities

1700 deep sea fishing fleets

In addition to lack of technology for post harvest processing and lack of investment on deep sea fishing are the required areas to look into.

12. TOTAL EXPORTS OF PRODUCTS IN SELECTED CATEGORIES

Sri Lanka is ranked amongst the first 50 countries in the world exports with total share 0.2% in the world export market.

The main product categories are fresh fish, frozen fish and fish fillets of Tuna, Sword tail, Marlin and other fish species.

13. POTENTIAL FOR EXPANSION IN THE SECTOR

After the 30 years war is over , liberalizing the huge area of land and coast in the North and East are available for Aquaculture and sea farming of various varieties of fish and also to develop processing factories

More concentrate on value added and convenient food production with the limited production

Promote Organic Aquaculture production especially organic shrimps targeting high end markets.

Production of value added freshwater fish products for export is also has the potential for expansion by using the available reservoirs for freshwater fish culture,

Commercial culture of oysters, mussels and sea weed farming are lucrative areas to look into

14. STRENGTHS AND WEAKNESSES OF THE SECTOR

Strengths	Weaknesses
Year-round fishing and decentralized fish harbour facilities	Inadequate applications of modern technology for deep sea / offshore fishing and
Exclusive Economic Zone (EEZ) of 517,000 km ²	Lack of raw material for processing and value
Sri Lanka has a coastline of around 1,700 km and the coastal zone is of considerable socioeconomic importance. More importantly it contains a variety of coastal habitats that include estuaries and lagoons, mangroves, sea grass beds, salt marshes, coral reefs and large extents of beaches and dunes that are vital to ecological functioning and maintenance of coastal biodiversity.	Under-utilization of deep sea fisheries resources
Sri Lanka has an extensive freshwater and brackish water resource to sustain viable fishing and can be used for Aquaculture .	Growing consumer concern towards eco-friendly chemical free fishery products.
Adherence to CITES regulations to protect endangered fish species	Decline of shrimp supply for export due to sudden disease outbreaks.

Prepared by:
Ms. S.A.G. Anuradha - Deputy Director, EDB, Sri Lanka

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